

Volunteer Income Tax Assistance Grant Program

Frequently Asked Questions

Category: Reporting Requirements

Updated 01/01/2010

1. *If I receive an award, what reports are required?*

Please refer to <http://www.irs.gov/individuals/article/0,,id=184243,00.html> for specific reporting requirements. Information on reporting requirements can be found in the document titled, *Guidelines for VITA Grant Reports*.

2. *Can I get an extension if I cannot file my quarterly report by the due date?*

Maybe. Under unusual circumstances, grant recipients may request an extension of time to submit reports. The request must be submitted in writing to the Grant Program Office at least five business days prior to the due date of the report, and your organization must receive a written response confirming the extension before the due date. Failure to submit reports by the due date may result in ineligibility for subsequent year funding.

3. *When is my first quarterly report due?*

If a recipient's Payment Management System account is established and funded before December 31, 2009, the recipient must file the Federal Cash Transaction Report by January 30, 2010 whether or not federal funds are withdrawn. If a recipient's PMS account is established and funded after January 1, 2010, the first Federal Cash Transaction Report is due by April 30, 2010.

4. *If I have not drawn down any funds and only have expenses, is a quarterly report required for January 30, 2010?*

Yes, if your PMS account was established and funded on or before December 31, 2009. A quarterly report is required to report all expenses from July 1, 2009 through December 31, 2009.

5. *What information should be included in the year-end report?*

The final report (sometimes referred to as year-end report) will include:

1. SF-PPR, Performance Progress Report
2. SF-PPR-A, PPR Performance Measures
3. SF-PPR-B, PPR Program Indicators
4. Narrative (and attachments as explained)
5. Budget Detail Explanation